Separation Action

Use this procedure to separate an employee from the State. The procedure is broken down by role, since multiple people are responsible for performing portions of this procedure.

Perform this procedure when an employee has voluntary or involuntarily decided to separate from state service and the separation date is known.

- The separation date is known.

In order to perform this transaction you must be assigned the following role:
Personnel Administration Processor, **Payroll Processor**, the **Benefits Processor**, and the **Time and Attendance Processor**

- Human Resources   Personnel Management   Administration   HR Master Data   Personnel Actions
  -or-

- Human Resources   Personnel Management   Administration   HR Master Data   Maintain

PA40 -or- PA30

Date	Procedure Update Log
3/25/09	Previous steps 57-62 (changing the Payroll Status (0003) infotype) removed from procedure.

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Helpful Hints

- The **Personnel Administration Processor**, the **Payroll Processor**, the **Benefits Processor**, and the **Time and Attendance Processor** will use this procedure to separate an employee from their current position, terminate an employee‟s retirement benefits, compensate them for unused leave, delimit their personal holiday, and delete any time/compensation entries past the separation date. Each person will only see the screens allowed by their security level.

- If the employee has separated from state service prior to the completion of six continuous months and has accrued annual leave, the accrued amount will need to be removed so it is not accessible to the employee if they do return to state service at a later date. Follow the **Quota_Removing Accrued Leave** user procedure.

- If the employee has multiple concurrent positions and is only being separated from one position, be careful to delimit only infotypes related to the separated position.

- Leave buyout information for PERS Plan 1, TRS Plan 1, and WSPRS Plan 1 members commissioned prior to July 1, 2001 should be reported to DRS. In creating leave buyout for PERS Plan 2 employees, the infotype 9004 (Annl Leave Buyout – No Ret) should be used. If an incorrect infotype is created, the buyout will be reported to DRS and will need to be deleted.

Personnel Administration Processor tasks:

- Perform the separation action

Payroll Processor tasks**:**

- Delimit recurring payments

- Delimit bond purchases

- Compensate for unused leave

Questions to think about:

Is the employee entitled to an accrual?

- Has leave been taken for the pay period?

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- Have the Time and Attendance Processor delete any time/compensation entries in CATS that were entered past the separation date.

- PT50 and ZCAT6 should be ran on the employee to make sure the employee has the correct leave balance.

- Correct leave buyout codes reported to DRS
  HRMS only sends status codes *A* and *B* to DRS. Annual leave buyouts should be reported as status codes *N* for non-retirees or *T* (up to 240 hours) for retirees. Excess vacation leave cash buyouts for retirees should be reported using status code *U*. After the information is sent to DRS, you will have to go to DRS Web-based Services to logon, create and submit a report via the Web-Based Employer Transmittal (WBET) application. Change the status code on the leave buyouts to *N, T* or *U*. For more information on this process, see Correct Leave Buyout Reporting To DRS.

- Change the Payroll Status (if required)

- If the separation is a result of a Reduction in Force (RIF), the employee has the option of deferring the payment of their annual leave buyout for 30 working days. If they elect to do that, you will need to change the Payroll status to continue running payroll for that employee until the date of the deferred buyout

  Benefits Processor tasks:

- Delimit savings and miscellaneous plans.

  Time and Attendance Processor tasks:

- Delete any time/compensation entries in CATS that were entered past the separation date.

- Delete any entries past the separation date from infotypes such as *Employee Remuneration Info* (2010) or *Absences* (2001).

  General Usage:

- The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

The procedure includes field descriptions along with their conditions. Their definitions are shown below:

R/O/C	Definition
R	designates a "required" entry necessary to proceed in this transaction.
O	designates an "optional" entry.
C	designates a "conditional" entry that may be required under certain conditions.

+Procedure

1.   Start the transaction using the above menu path or transaction code **PA40**.

Personnel Actions

2. Complete the following fields:

Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number. **Example:** 20000549

3. Click (Enter) to validate the information.

4. Perform one of the following:

If	Go To
You are the *Personnel Administration Processor*	Step 5
You are the *Payroll Processor*	Step 16
You are the *Benefits Processor*	Step 63
You are the *Time and Attendance Processor*	Step 72

5. Complete the following fields:

Field Name	R/O/C	Description
From	R	The start date for the action. The date for the separation action will be the day after the date entered here. **Example:** 8/15/2005

6. Click (Enter) to validate the information.

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Personnel Actions

7. Click the gray box to the left of Separation to select.

8. Click (Execute) to begin the separation action.

Copy Actions

9. In the **Reason for Action** field, click [Matchcode icon] (Matchcode) to open the selection list.

Reason for Action

Reason for Action (1) 35 Entries Found

Restrictions

Action Type: U5
Name of action type: Separation

Ac...	Name of reason for action
01	Abandonment of Position
02	Career Seasonal Layoff 3-9 Mon
03	Career Seasonal Layoff 9 + Mon
04	Death
05	Disability Separation-Voluntar
06	Disability Separation-Invol.
07	Dismissal
08	Emergency Apptmt Separation
09	Erroneous Apptmt/Certification
10	Exempt Separation
11	Failed to Comply W/Union Shop
12	FMLA New Born Child Care
13	Formal Union Layoff
14	Intermittent Separation
15	Moving from Vicinity
16	Non-Disciplinary Separation
17	Not Meeting Condition of Emplo
18	Probationary Separation
19	Project Apptmt Separation
20	Resign - Illness
21	Resign - Other
22	Resign With RIF Rights
23	Retirement
24	Retirement With RIF Rights
25	Reversion Out to Register

35 Entries Found

10. Click the appropriate reason to select.

11. Click ✔ (Copy) to accept.

12. Click ⊘ (Enter) to validate the information.

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13. Click ⊟ (Save) to save.

ℹ️ If a **Create Vacancy** screen or **Delimit Vacancy** displays. Click Yes to proceed.

Copy Organizational Assignment

Infotype   Edit   Goto   Extras   System   Help

Copy Organizational Assignment (0001)

Org Structure

Personnel No.	956687	Name	TY AHLQUIST
PersArea	3024 DSHS Region 4	EEGroup 0 Permanent
PSubarea	00JE Econ/SocialSvcs	EESubgroup 04 M-OT Elig>Daily Sche Status Withdrawn
Start	08/16/2005 to	12/31/9999

Enterprise structure
CoCode	WA01	STATE OF WASHINGTON			
Pers.area	3024	DSHS Region 4	Subarea	00JE	Econ/SocialSvcs
Cost Ctr	3000000000	000000000000000...	Bus. Area	3000	Dept of Social & Health S...
			Fund		

Personnel structure
EE group	0	Permanent	Payr.area	11	Semi-monthly
EE subgroup	04	M-OT Elig>Daily Sche	Contract	Trial Service	

Organizational plan
Position	99999999	Kimiko Kuei
Job key	50016934	
Exempt		
Org. Unit	30016927	
Org.key	3000	

Administrator
PersAdmin	
Time	
PayrAdmin	

14. Click ✅ (Enter) to validate the information.

15. Click ⊟ (Save) to save.

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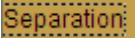
⚠️   For the **Personnel Administration Processor**, this marks the end of the Separation action. After saving, end the transaction and transfer the information to the **Payroll Processor** who will complete the next steps.

ⓘ   The **Payroll Processor** will need to verify and correct quota balances before starting their portion of the separation action.

The **Payroll Processor** will complete the following steps:

16. Click the gray box to the left of Separation .

17. Click ⏰ (Execute) to begin the separation action.

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Copy Actions

18. Click [⏱ Execute info group].

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19. An information pop up box will appear informing you that "This entry will delete a record." Click ✔ (Enter) to continue.
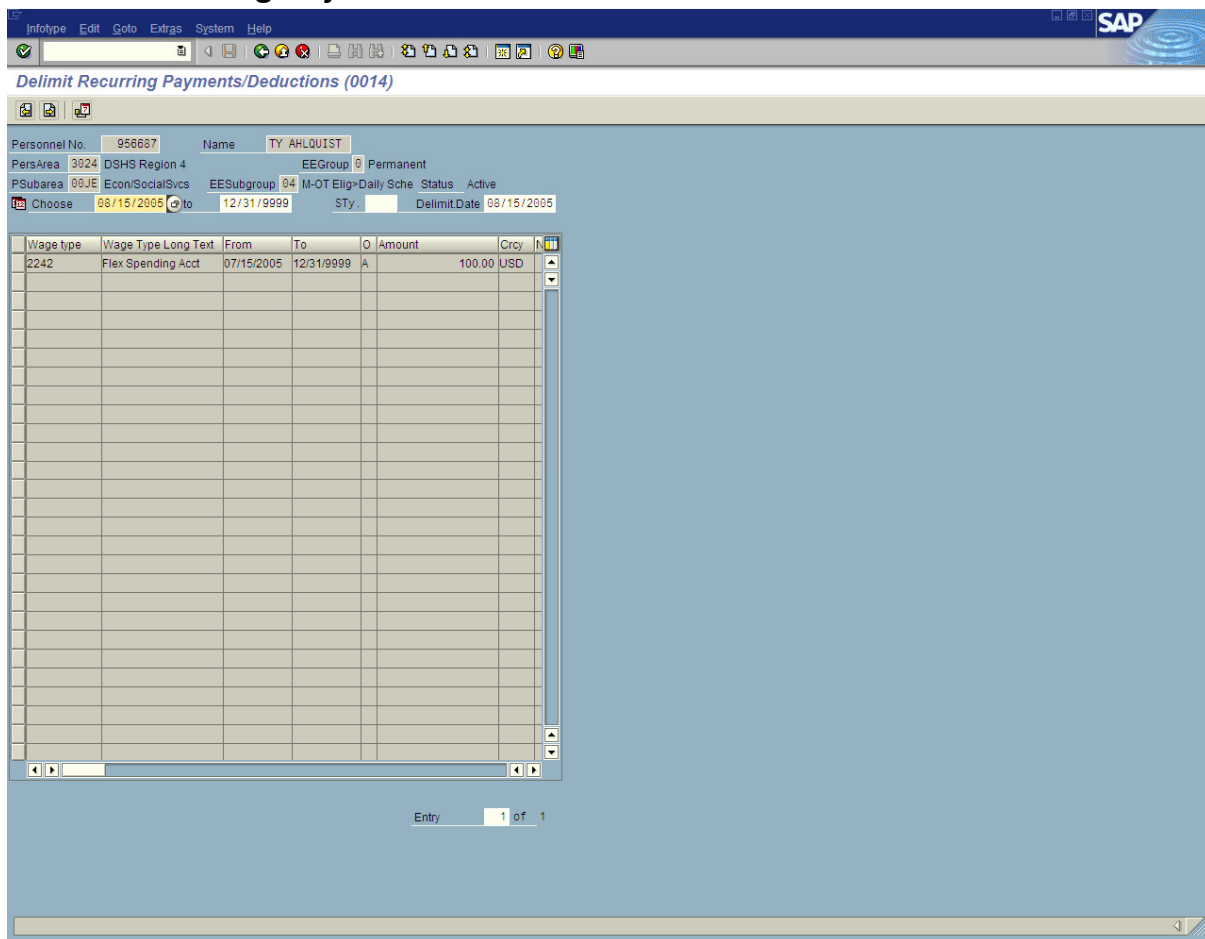
20. An Execute info group pop up box will appear informing you that "Warning: Personnel action infotype not saved with 'execute info group' function! Click ✔ Continue.

🛈 The ***Personnel Processor*** has already saved this infotype so it is ok to continue.

21. Click 📤 (Next Record) until you reach Delimit Recurring Payments/Deductions.

Delimit Recurring Payments/Deductions

22. Click the gray box to the left of the payment or deduction to delimit.

23. Click 📅 (Delimit) to assign the delimitation date to the record.

24. Repeat for additional payments/deductions.

Delimit Bond Purchases

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25. As required, complete/review the following field:

Field Name	R/O/C	Description
Delimit Date	R	The date when the action should end. ❌ The delimit date is any date within the *pay period*.

26. Click the gray box to the left of the record to delimit.

27. Click 🗐 (Delimit) to assign the delimitation date to the record.

Subtypes for infotype "Time Quota Compensation"

ESG	PSG	Comp.meth.	Description
2	10	1000	Free compensation
2	10	1001	Vacation Payout
2	10	1002	Sick time payout
2	10	1003	Personal Time Off payout
2	10	1004	Floating Holiday payout
2	10	1005	Overtime Comp Time Payout
2	10	9001	Sick Leave Buyout - Tax
2	10	9002	Sick Leave Buyout -No Tax
2	10	9003	Annl Leave Buyout-Ret
2	10	9004	Annl Leave Buyout -No Ret
2	10	9006	Comp Time Buyout
2	10	9007	Sick Leave Buyout - VEBA
2	10	9008	Comp Time Buyout-No Ret
2	10	9009	Holiday Credit Buyout WSP
2	10	9010	Settl Lv Buyout WSP-NoRet
2	10	9011	Settl Lv Buyout WSP-Ret
2	10	9012	Hol. Cr. Buyout WSP-NoRet
2	10	9999	YTD Sick Lv Taken - Conv

18 Entries Found

28. Click the appropriate compensation method to select.

29. Click ✔ (Copy) to accept.

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Create Time Quota Compensation

30. Click the gray box to the left of the quota to compensate.

> Prior to activating the buyout, verify the employee's eligibility. Make sure that the start date is the last day of employment so that the employee will be paid on their last day.

31. In the **No. to compensate** box, enter the number of hours to compensate.

32. On the toolbar, click 📠 Compensate to process the compensation.

33. Click ✅ (Enter) to validate the information.

34. Click 💾 (Save) to save.

35. If the employee has more quotas to compensate go to **PA30**.

Maintain HR Master Data

36. Click the Time Recording tab.

37. In the direct selection field enter *Time Quota Compensation* in the infotype filed and select the appropriate Subtype to compensate in the Sty filed.

38. Click ☐ (Create) to create a new record.

Create Time Quota Compensation (0416)

39. Complete the following fields:

Field Name	R/O/C	Description
Start	R	The Date of the employee's last day of employment. **Example:** 8/15/2006
No. to compensate	R	The amount of leave to compensate. **Example:** 997.80000

40. Click [Compensate] .

41. Click ✅ (Enter).

42. Click 💾 (Save).

43. Repeat steps 35-42, if you need to compensate for more quota types.
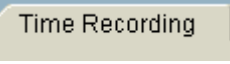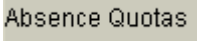
ℹ️ You have completed compensating the employee for leave earned.
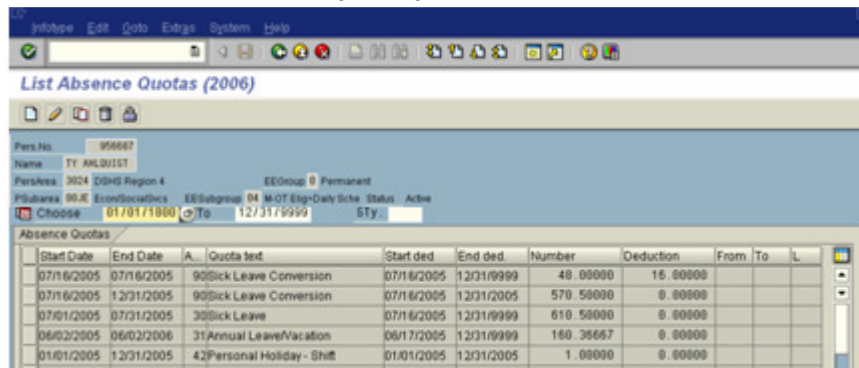
44. To put an end date on any remaining leave quotas, go to **PA30.**

ℹ️ You may want to put an end date on remaining leave quotas in the situation an employee is hired back and not eligible to take a personal holiday when they return.

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45. Click the Time Recording tab.

46. Click the gray box to the left of Absence Quotas to select.

47. Complete the following fields:

48. In the period field, click ◉ A11 .

49. Click 🖼 (Overview) to view a list of quota types.

List Absence Quotas (2006)

50. Click the gray box to the left of the quota you are putting an end date on.

51. Click 🖉 (Change) to change the record.

Copy Absence Quotas (2006)

52.   Complete the following fields:

Field Name	R/O/C	Description
Deduction to	R	The date after the employee left state service.
		Example: 8/16/2005

53.   Click ✅ (Enter) to validate the information.

54.   Click 💾 (Save) to save the record.

55.   Repeat steps 44-54 to put an end date on any remaining quota types.

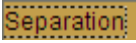56.   If required, correct the leave buyout codes reported to DRS.

ℹ️

HRMS only sends status codes *A* and *B* to DRS. Annual leave buyouts should be reported as status codes N for non-retirees or T (up to 240 hours) for retirees. Excess vacation leave cash buyouts for retirees should be reported using status code *U*. After the information is sent to DRS, you will have to go to DRS Web-based Services to logon, create and submit a report via the Web-Based Employer Transmittal (WBET) application. Change the status code on the leave buyouts to *N, T* or *U*. For more information on this process, see Correct Leave Buyout Reporting To DRS.

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⚠ For the **Payroll Processor**, this marks the end of the Separation action. After saving, end the transaction and transfer the information to the person who sets up employee benefits in HRMS (Retirement). This role is the **Benefits Processor.** This could be the **Payroll Processor, Personnel Processor that also the role of Benefits Processor** who will complete the next steps.

The **Benefits Processor** will complete the following steps:

57. Click the gray box to the left of Separation to select.

58. Click ⏰ (Execute) to begin the separation action.

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Copy Actions

```
  Infotype   Edit   Goto   Extras   System   Help
```

Copy Actions (0000)

Execute info group   Change info group

Pers.No.	956687
Name	TY AHLQUIST
PersArea	3024 DSHS Region 4	EEGroup 0 Permanent
PSubarea	00JE Econ/SocialSvcs	EESubgroup 04 M-OT Elig>Daily Sche Status Active
Start	08/16/2005 to 12/31/9999

Personnel action

| Action Type | Separation |
| Reason for Action | ☑ |

Status

| Employment | Withdrawn |

Organizational assignment

Position	99999999	Kimiko Kuei
Personnel area	3024	DSHS Region 4
Employee group	0	Permanent
Employee subgroup	04	M-OT Elig>Daily Sche

Additional actions

Start Date	Act.	Action type	ActR	Reason for acti

59. Click Execute info group .

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60. An information pop up box will appear informing you that "This entry will delete a record." Click ✅ (Enter) to continue.
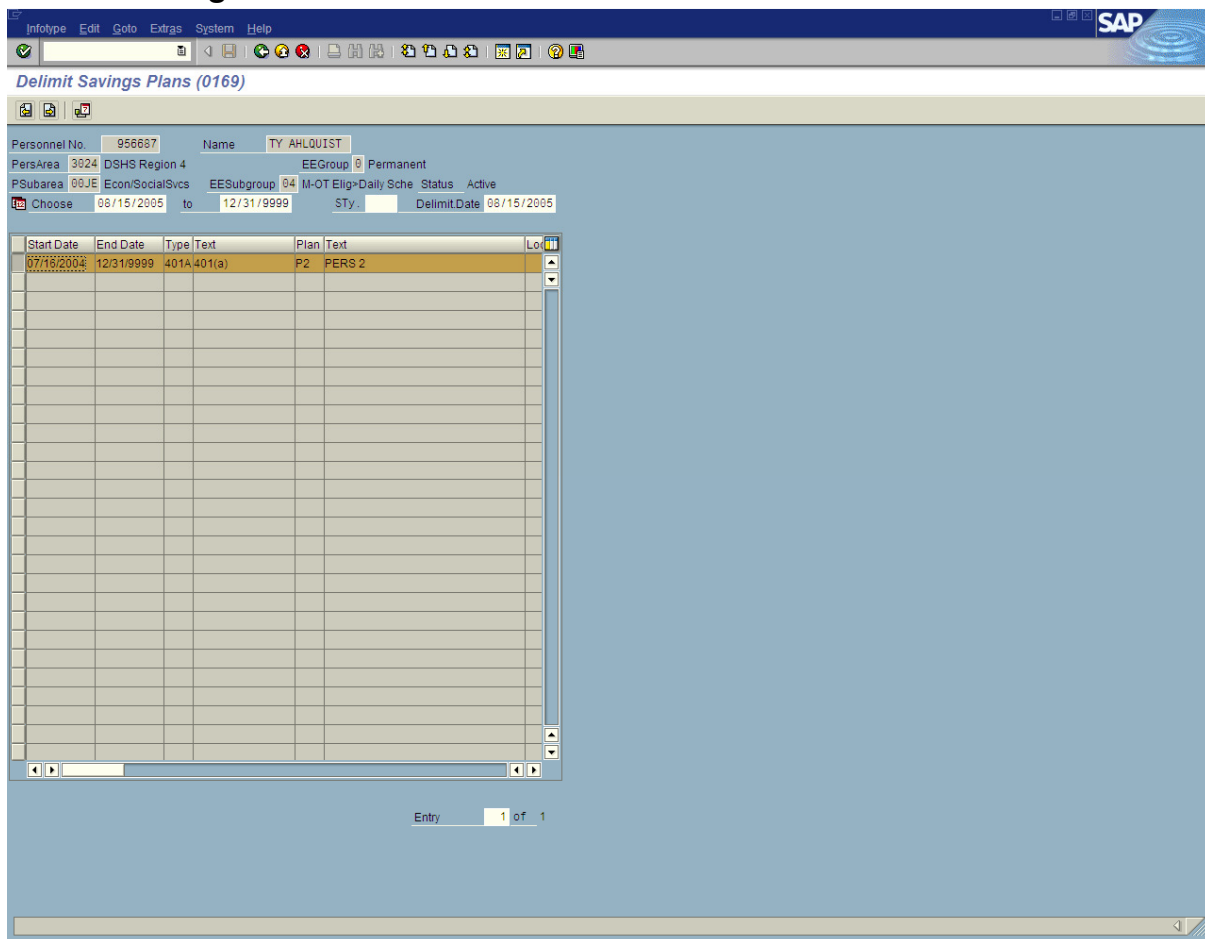
61. An Execute info group pop up box will appear informing you that "Warning: Personnel action infotype not saved with 'execute info group' function! Click ✅ Continue .
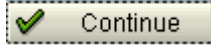
    ⓘ   The Personnel Processor has already saved this infotype so it is ok to continue.

62. Click 🔁 (Next Record) until you reach Delimit Savings Plans.

Delimit Savings Plans

63. Complete the following fields:

Field Name	R/O/C	Description
Delimit Date	R	The Delimit Date. ⓘ Savings should have an end date of the last day of the period therefore the delimit date will always be either the 16th or the 1st.

64. Click the gray box to the left of the plan(s) to delimit. If there is other savings plans (i.e. deferred compensation) select all plans and this will delimit everything in one step.

65. Click 🗗 (Delimit) to complete the transaction.

ⓘ This is the end of the Separation action using the PA40 transaction. The next step is to delimit the employee's Health Insurance plans. To do this you will need to update the *Health Plans* (0167) infotype.

66. Start the transaction using transaction code **PA30**.

67. Click the ⬚ Benefits ⬚ tab.

68. Click the gray box to the left of ⬚ Health Plans ✓ to select.

69. Click the *All* radio button in the **Period** area.

HR

Period

Period	
◯ Period	
Fr. [____]	To [____]
◯ Today	◯ Curr.week
◉ All	◯ Current month
◯ From curr.date	◯ Last week
◯ Up to Today	◯ Last month
◯ Current Period	◯ Current Year
[icon] Choose	

70. Click [icon] (Overview) to display the health plans.

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List Health Plans (0167)

71. Click the gray box to the left of the current health plan record (End Date will be 12/31/9999) and Click ✏️ (Change).

72. Complete the following fields:

Field Name	R/O/C	Description
To Date	R	The ending date of the record. ℹ️ Health Plans should have an end date of the last day of the month. **Example**: 10/31/2XXX

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Change Health Plans (0167)

73. Click ![Enter icon] (Enter) to validate the information.

74. Click ![Save icon] (Save) to save.

![X icon] Health insurances premiums are collected each pay period. As an example, the July 10 and July 25 pay dates collect the health insurance premiums for the month of July. If the employee separates from State service prior to the second pay date of the month, the employee still owes their portion of their Health Benefits to the agency. The Payroll Processor will enter those employee deductions using *Additional Payments* (0015) and wage type 2983 Health Adjustment PreTax. See OLQR procedure *Create One Time Deduction.*

75. Repeat steps 72 – 80 to delimit any other Health Plans such as Dental.

⚠️ For the **Benefits Processor**, this marks the end of the Separation action. After saving, end the transaction and transfer the information to the **Time and Attendance Processor** who will complete the next steps.

- The **Time and Attendance Processor** will complete the following steps:

76. If time/compensation entries were made in advance into infotypes such as *Employee Remuneration Info* (2010) or *Absences* (2001),

77. If time/compensation entries were made in advance in CATS for this employee, go to CATS (/**nCAT2**) and delete any entries past the separation date.

78. You have completed this transaction.

Result

You have successfully separated an employee, terminated any recurring payments, delimited their retirement benefits, compensated them for unused leave, and deleted any time/compensation entries past the separation date.